CLAIMS

I claim:

1. A transaction filtering system for allocating transactions among a plurality of business objects, the system comprising:

storage configured to store generated allocation rules and to store transaction data associated with the plurality of transactions, each generated allocation rule being associated with at least one of the plurality of business objects and being generated using relationships between members of the plurality of business objects;

a query engine configured to query the transaction data using the generated allocation rules; and

an allocation manager configured to make one or more attempts to allocate a member of the plurality of transactions among the plurality of business objects.

2. The transaction filtering system of claim 1, wherein a member of the plurality of transactions is a sale and the query is configured to determine commission allocation.

3. The transaction filtering system of claim 1, wherein a member of the plurality of transactions is a purchase and the query is configured to determine cost allocation.

4. The transaction filtering system of claim 1, wherein a member of the plurality of transactions is unallocated after a first attempt at allocation.

5. The transaction filtering system of claim 1, wherein a member of the plurality of transactions is under-allocated after a first attempt at allocation.

6. The transaction filtering system of claim 1, wherein a member of the plurality of transactions is over-allocated after a first attempt at allocation.

7. The transaction filtering system of claim 1, wherein a second attempt at allocating the member of the plurality of transactions includes identifying a business object configured to manually determine the allocation.

8. A hierarchical data structure comprising:

a root node;

one or more intermediate nodes related to the root node;

a leaf node;

a first generated allocation rule associated with the leaf node and configured for use in determining allocation of transactions to a business object associated with the leaf node; and

a second generated allocation rule associated with one of the one or more intermediate nodes and configured for use in determining a business object configured to manually determine the allocation of one of the transactions to a business object.

9. The hierarchical data structure of claim 8, wherein the business object configured to manually determine the allocation is a person.

10. The hierarchical data structure of claim 8, wherein the business object associated with the leaf node is an account.

11. The hierarchical data structure of claim 8, wherein the business object associated with the leaf node is a task.

12. A computing system for hierarchical transaction filtering, the computing system comprising:

storage configured to store a hierarchical data structure, a first generated allocation rule, a second generated allocation rule, and transaction data;

an allocation manager configured to track allocation of transactions represented by the transaction data; and

a query engine configured to execute a first query on the transaction data using the first generated allocation rule and, responsive to the first query, to execute a second query on the transaction data using the second generated allocation rule.

13. The computing system of claim 12, wherein the hierarchical data structure is configured to represent relationships between business objects in an organization.

14. The computing system of claim 12, wherein the first generated allocation rule includes a predefined rule inherited from a parent node.

15. The computing system of claim 12, wherein the first generated allocation rule is produced by traversing the hierarchical data structure.

16. The computing system of claim 12, wherein the second query is configured to identify a business object having a management role with respect to a node of the hierarchical data structure.

17. The computing system of claim 12, further including a transaction source configured to generate the transaction data.

18. A transaction allocation output comprising:

a first set of transactions selected using a first query, the first query based on an allocation rule generated using a hierarchical data structure and associated with a leaf node of the hierarchical data structure, at least one transaction of the first set of transactions including a transaction value;

a second set of transactions whose allocation is determined by a business object, the business object being identified using a second query, at least one transaction of the second set of transactions including a transaction value; and

a summation of the transaction values.

19. The transaction allocation output of claim 18, wherein the transaction allocation output includes data stored on a computer readable medium.

20. The transaction allocation output of claim 18, wherein the transaction allocation output includes digital data transferred through a communications channel between a computing system and a client.

21. The transaction allocation output of claim 18, wherein the second query is generated using the hierarchical data structure.

22. The transaction allocation output of claim 18, wherein the generated allocation rule includes a predefined rule associated with a node of the hierarchical data structure.

23. A method of determining allocation of one or more transactions, the method comprising:

accessing a first allocation rule associated with one of a plurality of business objects represented by a hierarchical data structure;

executing a first query on transaction data using a query engine, the first query being based on the first allocation rule, the transaction data characterizing the one or more transactions;

accessing a second allocation rule associated with another of the plurality of business objects represented by the hierarchical data structure; and

executing a second query on a subset of the transaction data using the query engine, the second query being based on the second allocation rule and identifying a business object for determining allocation of at least one of the one or more transactions.

24. The method of claim 23, wherein the business object determines allocation manually.

25. The method of claim 23, further including receiving the transaction data characterizing the one or more transactions from a transaction source.

26. The method of claim 23, further including allocating the one or more transactions responsive to the results of the queries.

27. The method of claim 23, wherein a subset of the transaction data is representative of a subset of the one or more transactions.

28. The method of claim 23, wherein a subset of the transaction data is representative of a subset of the one or more transactions, and the subset of the one or more transactions includes an under-allocated transaction.

29. The method of claim 23, wherein a subset of the transaction data is representative of a subset of the one or more transactions, and the subset of the one or more transactions includes an unallocated transaction.

30. The method of claim 23, wherein a subset of the transaction data is representative of a subset of the one or more transactions, and the subset of the one or more transactions includes an over-allocated transaction.

31. A method of generating a transaction allocation output, the method comprising:

receiving a query result including one or more transactions, the query result generated using a query applied to a set of transactions, the query

generated using a hierarchical data structure and the query associated with a leaf node of the hierarchical data structure;

determining transaction allocation of any of the one or more transactions that are unallocated, under-allocated, or over-allocated;

parsing each of the one or more transactions to determine a value of each of the one or more transactions;

summing the values determined by parsing each of the one or more transactions; and

including the sum of the determined values in the transaction allocation output.

32. The method of claim 31, wherein the one or more transactions include a sales commission.

33. The method of claim 31, wherein the one or more transactions include a purchase cost.

34. The method of claim 31, wherein the one or more transactions include an inventory allocation.

35. The method of claim 31, wherein the one or more transactions include a resource allocation.

36. The method of claim 31, wherein determining transaction allocation of any of the one or more transactions that are unallocated, under-allocated, or over-allocated, is determining transaction allocation of an unallocated transaction.

37. The method of claim 31, wherein determining transaction allocation of any of the one or more transactions that are unallocated, under-allocated, or over-allocated, is determining transaction allocation of an under-allocated transaction.

38. A system for determining allocation of a plurality of transactions among a plurality of business objects, the system comprising:

storage configured for storing transaction data characterizing the plurality of transactions;

means for executing a plurality of queries on the stored transaction data, using a plurality of allocation rules, the queries configured to determine allocation of the plurality of transactions; and

means for manually determining allocation of a subset of the plurality of transactions, the subset including unallocated, under-allocated or over-allocated transactions.

39. The system of claim 38, wherein the subset of the plurality of transactions is determined responsive to the results of the plurality of queries.

40. The system of claim 38, wherein the subset of the plurality of transactions includes unallocated transactions.

41. The system of claim 38, wherein the subset of the plurality of transactions includes over-allocated transactions.

42. The system of claim 38, wherein a member of the plurality of queries is configured to select transactions to be allocated to a member of the plurality of business objects.

43. A computer readable medium storing computer code for determining an allocation plan, the computer code comprising:

a code segment for accessing a first allocation rule associated with one of a plurality of business objects represented by a hierarchical data structure;

a code segment for executing a first query on transaction data using a query engine, the first query being based on the first allocation rule, the transaction data characterizing the one or more transactions;

a code segment for accessing a second allocation rule associated with another of the plurality of business objects represented by the hierarchical data structure; and

a code segment for executing a second query on a subset of the transaction data using the query engine, the second query being based on the second allocation rule and identifying a business object for determining allocation of at least one of the one or more transactions.